

From PricewaterhouseCoopers LLP

Beneficiary Financial Counseling

What is Beneficiary Financial Counseling?

Independent financial counseling resources provided by PricewaterhouseCoopers LLP (PwC) are designed to help beneficiaries make sound financial decisions at a difficult time.

Who can access these services?

All beneficiaries receiving proceeds of \$25,000 or more. Beneficiaries must opt in to the service and there are no product sales involved.

Is this service automatically provided?

Beneficiaries must opt in to the service. Information will only be shared with PwC after an authorization is signed by the beneficiary. The level of service available depends on the amount of proceeds received.

How will my beneficiary learn of this service?

Beneficiaries will receive materials explaining the program with the insurance benefit check. The package will outline the options available for the beneficiary and provide contact information for PwC.

What resources are available?

- Beneficiary reference guide
- Access to a financial counseling website for 12 months
- Financial Fitness assessment
- Step-by-step assistance in completing a personalized financial plan
- Bi-monthly newsletter

Beneficiary Financial Counseling

Who can answer my financial questions after the passing of a loved one?

How will I meet my expenses?

What are the tax implications of receiving insurance proceeds?

What should I do with insurance proceeds?



Helping your family in its time of need

Independent financial counseling resources provided by PricewaterhouseCoopers LLP (PwC) are designed to help beneficiaries make sound financial decisions at a difficult time.

Who is PwC?

PwC is a professional services firm with decades of experience in personal financial education and counseling. PwC provides objective, independent financial counseling with absolutely no product sales.

Who can access these services?

All beneficiaries receiving proceeds of \$25,000 or more. Beneficiaries must opt in to the service and there are no product sales involved.

How will my beneficiary learn of this service?

Beneficiaries will receive materials explaining the program with the insurance benefit check. The package will outline the options available for the beneficiary and provide contact information for PwC. We will only share information with PwC after an authorization is signed by the beneficiary.

What resources are available?

- Beneficiary reference guide
- Access to a financial counseling website for 12 months
- Financial Fitness assessment
- Step-by-step assistance in completing a personalized financial plan
- Bi-monthly newsletter
- Additional personalized resources are available to those beneficiaries making decisions about higher proceed amounts.

PricewaterhouseCoopers LLP

PricewaterhouseCoopers LLP has been providing personal financial counseling services for decades. The PwC professionals who provide these services are experienced financial counselors who are trained in the need to maintain client confidentiality. Their sole concern is to provide independent and objective counseling. They do not sell investments or financial products.